

To review your Maintenance of Effort compliance status with Rachel Zellmer, please contact Marge Schenk at marjorie.schenk@dpi.wi.gov. She will schedule a conference call time.

FY 2013 MOE Compliance Report Open

MOE Technical Assistance: http://sped.dpi.wi.gov/sped_grt-moe

The IDEA Maintenance of Effort Compliance Report and Exception software is now available to LEAs through the Special Education Web Portal at <https://www2.dpi.state.wi.us/seportal/Pages/SignIn.aspx>. All individuals who have access to the LEA's IDEA budgets will see "IDEA Maintenance of Effort" in the Applications table on the Local Performance Plan Main Menu page.

The MOE compliance report pulls in expenditure data from the PI 1505 Special Education Annual Report. The MOE compliance report pulls in revenue and transfer data from the PI 1505 Annual Report (SAFR). If your LEA has not yet entered data into these reports, the MOE compliance report will show a status of "No Data."

MOE compliance will not be determined until after September 30, 2013. However, LEAs are encouraged to upload their fiscal information prior to September 30 so appropriate measures can be taken to meet MOE compliance. This may include, for some LEAs, a return of IDEA grant funds claimed so special education expenditures can instead be covered with local funds.

The MOE Guide has been updated to reflect FY 2013 compliance information:

<http://sped.dpi.wi.gov/files/sped/pdf/idea-moe-guide.pdf>

An exception "checklist" has been created to help districts analyze possible exceptions that would apply to their situation. This checklist will be updated as additional scenarios are uncovered. The document is located on the MOE technical assistance page, specifically:

<http://sped.dpi.wi.gov/files/sped/pdf/exception-checklist.pdf>

MOE and Open Enrollment Technical Assistance

Due to the questions around open enrollment coding, the following technical assistance document has been updated, and hopefully is much easier to understand than the prior version:

<http://sped.dpi.wi.gov/files/sped/pdf/moe-oe-calculator.pdf>.

Prior to fiscal year 2012, LEAs coded the flat-rate open enrollment (OE) amount tied to students with disabilities in fund 27. Because this amount is not considered an excess cost of providing special education, LEAs must code the flat-rate OE tuition amounts for all students in fund 10.

For most, this will not cause an LEA to fail all four tests when analyzing compliance with the MOE requirement. However, in those situations where the recoding has caused an LEA to fail MOE compliance, the "MOE – Open Enrollment Coding" technical assistance document describes the process DPI will use to determine compliance if the LEA believes that the recoding of open enrollment costs is

the cause of LEA MOE failure. These steps should be completed by the LEA prior to requesting an administrative MOE exception based on open enrollment coding.

MOE and Late Medicaid Payments

If an LEA received Medicaid payments from expenditures that were incurred PRIOR to FY 2011-12, and the LEA believes this is why the LEA failed MOE compliance, then an administrative exception for MOE may be possible.

Unless the LEA has failed all four MOE tests, a late Medicaid revenue exception will not be necessary. If the LEA has failed all four MOE tests and there are not enough normal exceptions to cover the failed by amount, the LEA will need to e-mail Rachel Zellmer with the Medicaid revenue information, including the amounts tied to the year the expenditures were incurred. For example, District A would e-mail the following information: \$8,647 2009-10 SBS; \$11,000 2010-11 SBS Cost Settlement. DPI will create an MOE scenario calculator to determine if MOE would have been met the year the revenue should have been received. If MOE would have been met in prior years with the additional revenue, the revenue received in FY 13 will be removed from the FY 2012-13 calculation. An administrative exception will be entered for the amount the LEA fails to maintain effort.

LEAs can do a quick check to see if a Medicaid administrative exception would be possible: Review the MOE reports during the years the Medicaid revenue should have been received. If the LEA passed MOE by a sizeable increase in expenditures, then it is probable that adding the revenue to those years would not impact the LEA's MOE compliance in those same years.